

DISCLAIMER: The Office of Energy Resources (OER) will be releasing an RFP in September 2023 for an Administrator of the State Energy Efficiency Programs beginning with the 2026 State Energy Efficiency Program Year.

OER seeking public comments on the drafted RFP scope of work and budgeted tasks but isn't requesting comments from any prospective bidders or subcontractors to bidders on this RFP.

Any potential bidders or subcontractors to bidders that submit comments to OER may be disqualified from submitting a proposal to this RFP.

State Energy Efficiency Programs Administrator Scope of Work DRAFT

The information in this document is current as of June 26, 2023, but is subject to change at any time, at the sole discretion of the Office of Energy Resources.

CONTRACT TERMS

The contract period will begin approximately July 2024 and will continue through June 2029 with an option to extend the contract period for an additional 2 program years. The Office of Energy Resources (OER) may terminate the contract at any time if it is unsatisfied with vendor's performance. If this event occurs, OER shall provide vendor with a minimum of 90 days' notice that the contract is being terminated. Upon contracting, the first approximately six months will be for establishing administrative processes, with the aim that the program planning and design will begin January 2025 with planning and implementation running through the 2028 program year. Each calendar year represents a distinct program year for which a plan must be designed, developed, implemented, and reported on. The contract period extends 6 months beyond the end of program implementation to carry out the vendor's remaining administrative tasks and reporting requirements.

BACKGROUND

In 2006, the Rhode Island General Assembly passed legislation that established the Comprehensive Energy Conservation, Efficiency and Affordability Act.¹ The Act created a groundbreaking mandate termed "least-cost procurement." Least-cost procurement includes procurement of energy efficiency and energy conservation measures that are prudent and reliable when such measures are a lower cost than the acquisition of additional supply, including supply for periods of high demand.²

¹ System Reliability and Least-Cost Procurement Statute: <http://webserver.rilegislature.gov//Statutes/TITLE39/39-1/39-1-27.7.htm>

² Least Cost Procurement Standards (2020): https://ripuc.ri.gov/sites/g/files/xkgbur841/files/eventsactions/docket/5015_LCP_Standards_05_28_2020_8.21.2020-Clean-Copy-FINAL.pdf

Under least-cost procurement, energy efficiency program budgets are developed to meet ambitious annual targets for electricity and natural gas savings, which are based on a detailed analysis of the amount of available cost-effective energy efficiency. To achieve the targets, “energy efficiency procurement plans” are developed and implemented annually, under the oversight and expert guidance of a consumer stakeholder committee, the Energy Efficiency and Resource Management Council (EERMC) and are subject to Public Utilities Commission (PUC) review and approval. The plans are composed of a portfolio of energy efficiency programs targeting different market sectors of energy consumers: residential, income-eligible residential, and commercial and industrial. The plans also contain an important component addressing system reliability, which considers the potential of “non-wires alternatives”—energy efficiency, demand response, distributed generation, and other innovative methods—to curtail electric load in constrained areas of the distribution network.

In June 2023, The Rhode Island General Assembly passed legislation and Governor McKee signed into law requiring the Office of Energy Resources issue an RFP for a program administrator (PA) of the state’s energy efficiency programming (gas and electric) through a competitive solicitation. The PA will be responsible for delivering energy efficiency services statewide. The PA will be required to assume all duties and responsibilities described in RIGL 39-1-27.7 and the latest least-cost procurement standards. The PA will also be subject to all Public Utilities Commission (PUC) oversight as described in RIGL 39-1-27.7 and the latest least-cost procurement standards. The PA may deliver these services using its own staff or subcontractors or a combination thereof. The PA must also provide ongoing redesign and modification of these services and propose new services for review and approval by the PUC. The PA is responsible for gathering and compiling relevant data to demonstrate the effectiveness of its service implementation.

In 2021, the Act on Climate set mandatory, enforceable emissions reductions targets for the State of Rhode Island resulting in net zero emissions by 2050, with interim targets. Over 50 percent of Rhode Island’s emissions come from the use of electricity and natural gas; most predominantly from residential heating and electricity consumption. Energy efficiency programs shall be designed in alignment with the State’s Act on Climate mandates.

Bidders must be prepared to design, implement, and evaluate statewide energy efficiency programming that meets the requirements of least-cost procurement to procure energy efficiency and energy conservation measures that are prudent and reliable when such measures are lower in cost than the acquisition of additional supply.

The PA’s primary responsibility will be the development, administration, and implementation of energy efficiency programming. The following sections provide the project objectives and define the scope of the PA’s responsibilities, services, and business functions.

The current energy efficiency programming provides services to the commercial and industrial sector, the residential sector, and the income-eligible sector. The State’s goals for customer sectors as identified above and the PA include:

- (1) achieving the maximum magnitude of societal net benefits while acquiring comprehensive cost-effective energy efficiency savings;

(2) responding appropriately to markets in order to increase the level of and comprehensiveness of energy efficiency services to Rhode Islanders;

(3) effectively capturing potential "lost opportunity" markets or energy saving opportunities that would not be realized without incented investments;

(4) equity across customer classes and geographic regions; and

(5) ensuring equitable program development and implementation to support participation from disadvantaged communities.

Bid proposals **must** include specific and measurable objectives. Proposals must include MWh and MMBtu savings and summer and winter coincident peak MW and MMBtu savings objectives, as well as objectives for other goals. This information should be integrated within the bidders' proposals.

The PA should approach the delivery of energy efficiency services with innovative and effective strategies to maximize energy savings, maximize program integration efforts, and promote market transformation. The PA should develop and maintain reliable administrative and monitoring procedures that will allow evaluation of the effectiveness of its efforts, provide a basis for program modification, and document its accomplishments. The successful bidder will possess both a proven capability to deliver energy efficiency services efficiently and effectively (via in-house staff, subcontractors, or a combination of both), and a demonstrated capacity to design and implement innovative approaches to securing energy efficiency improvements.

The State expects bidders to propose the best way to deliver energy efficiency services to the customer classes that were targeted to be served by the pre-existing programs. If bidders propose programs that are significantly different than those currently being provided, bidders must provide detailed descriptions of planned transitional activities.

Thus, the State seeks a contractor to become the Energy Efficiency PA that will live up to the legislative intent while approaching its program objectives with the dedication, innovation, and creativity necessary to achieve the broad program goals.

The functions to be performed by the PA are grouped into three major tasks, outlined here:

- **General Administration**
 - 1. **Budgeting**
 - 2. **Financial Management**
 - 3. **Contract Management**
 - 4. **Dispute Resolution**
 - 5. **Information Technology, Data Collection and Management**
 - 6. **Required Reports**
- **Program Planning, Operations, and Implementation**

- **Program Transition Responsibilities**

General Administration

The PA is responsible for the development and monitoring of its own day-to-day management and operational systems. This includes: (1) budgeting; (2) financial management; (3) contract management; (4) dispute resolution; (5) information technology, data collection and management; and (6) preparation and submission of required reports.

1. Budgeting

The PA must develop, monitor, and manage its budget for its operation, within certain broad parameters established by the PUC that will be embodied in OER's contract with the PA vendor³. These broad parameters may include spending requirements to address equity considerations.

At the start of operations, a detailed budget (shown on an estimated annual and three-year basis) must be developed and provided to OER, the Division of Public Utilities & Carriers (DPUC), the PUC, and the EERMC. This detailed budget must be divided into the following areas: (1) general administration; (2) information technology ("IT") development and maintenance; (3) energy efficiency service delivery and monitoring, divided into residential, income-eligible, and commercial and industrial sectors; and (4) costs related to the transition from the current PA to the new one (this area applies to the transition period only).

The PA must submit a revised estimated annual budget, showing the expected budget for each energy efficiency service area, for the following calendar year to OER, the DPUC, the PUC, the EERMC and each contributing distribution utility. The annual budgets will be subject to PUC review and approval. The PA should also include its proposed treatment of unspent budget amounts.

2. Financial Management

The PA must develop, implement, and maintain the necessary budgeting, invoicing, expenditure approval, payroll, and financial accounting systems to review, approve, and track budgets, invoices and payments to subcontractors, program implementers, employees, and, in some cases, customers.

It must maintain financial and accounting records consistent with general accounting standards. The PA shall provide information and documentation required for independent audits, which the PA shall have performed on an annual basis.

Consistent with the specific terms of its contract with OER, the PA must prepare and submit detailed documentation and invoices for administrative, management, and program costs to the

³ Previous energy efficiency docket rulings and budgets can be found on the PUC's website: <https://ripuc.ri.gov/events-and-actions/commission-docket>

OER for review to receive payment. All invoicing data along with proper supporting documentation must be kept by the PA and made available to OER, the DPUC, the PUC, and the EERMC upon request. All invoicing data along with proper supporting documentation must be submitted to the OER annually where they will be managed and retained in accordance with the State's recordkeeping processes.

Note: Bidders' proposals must detail the tools and mechanisms they will employ to satisfy the financial management requirements.

3. Contract Management

The PA will solicit, hire and/or contract with all necessary staff and contractors to effectively perform the scope of services outlined in this RFP in accordance with the State's equal employment opportunity requirements.

The PA must maintain the administrative capability to manage these resources and ensure the completion of each task and sub-task effectively. The PA must develop and implement procedures to assign, monitor, review, and approve completed work, and to ensure contractors are compensated in a timely manner.

4. Dispute Resolution

In conjunction with OER, the DPUC, the PUC, and the EERMC, the PA will develop protocols according to which it will deal with complaints concerning performance of its responsibilities from customers and stakeholders such as electric and gas utilities, subcontractors, trade allies and program participants. The protocols must include notification to customers and stakeholders of their right to submit complaints to the DPUC for investigation. Dispute resolution shall be exclusively governed by and construed in accordance with the laws of the State of Rhode Island.

The PA will participate fully, promptly, and in good faith in these dispute resolution processes.

5. Information Technology, Data Collection, and Management

The PA must develop and maintain an information management system capable of the reporting and monitoring tasks described within this RFP.

Data will be the property of the State of Rhode Island and must be kept in a relational database format and be organized in such a way that a third party could easily utilize necessary information for performing assessment tasks. Information in this system should include, but not be limited to, tracking data on participating customers, trade allies, and program services, and general program operation, financial and management data. In addition, the system should have the ability to produce *ad hoc* reports for periodic information requests from OER, the DPUC, the PUC and the EERMC.

The types of CPUs, storage peripherals, communication devices, network equipment, software, printers and any other products necessary for the PA data processing system are to be chosen by the bidder, must have the capabilities to perform the necessary tasks set forth in this section of

the RFP, and must be configured so that additional elements can be added without undue hardship, cost or difficulty.

In the future, the State may request that the PA collect and maintain additional specific data elements for the purposes of reporting and evaluation. The PA will be held to the minimum specifications detailed in its initial proposal.

a. Managing Customer-Specific and Competitively Sensitive Information

The PA must develop and maintain systems that provide appropriate protections in the collection, processing, storage, and retrieval of information that is customer-specific or could provide an unfair competitive advantage to an entity delivering services outside of the energy efficiency programs approved by the State for PA implementation. The PA will be responsible for managing such systems and, when appropriate, providing the information to its employees, subcontractors, regulators, and distribution utilities. Accordingly, the PA must develop and maintain a process with clearly defined standards and safeguards to govern sharing of that information with subcontractors, OER staff, and distribution utilities to ensure customer confidentiality is maintained and entities are not provided an unfair competitive advantage.

b. Program Data Collection

The PA must collect and electronically compile data needed to monitor, assess, and evaluate its program performance, to report on its activities, and to improve the design and delivery of the core programs. Data is to be submitted to the OER annually where it will be retained in accordance with the State's recordkeeping processes. Data from both subcontractors and employees should be collected and stored electronically in a consistent format in the following categories:

- Customer/Client Data;
- Customer Usage Data;
- Program Measures and Services Data;
- Trade Ally Data;
- Distribution Utility Account Data;
- Baseline and Market Indicator Data; and
- Other Data for Evaluation Purposes.

In addition, the PA will collect customer-specific data from the distribution utilities.

c. Administrative and Financial Data

The PA should keep records of administrative and financial data consistent with the needs outlined in the scope of work section of this RFP and with Generally Accepted Accounting Principles ("GAAP") as defined by both the Governmental Accounting Standards Board and the Financial Accounting Standards Board. This includes systems to track general project management, invoicing, payroll and subcontractor payments, and to produce the necessary reports for monitoring these duties.

6. Required Reports

The PA will prepare and submit Monthly, Quarterly, and Annual Reports. Previous examples of quarterly and annual program reports can be viewed here: <https://rieermc.ri.gov/resources/>. These standard formats should be designed so the reports build on each other to further minimize the administrative burden on the PA, (e.g., financial comparisons shall have a similar format in the Monthly, Quarterly, and Annual Reports). Monthly Reports are easily expanded into Quarterly and Annual Reports through the addition of more comprehensive information. Report formats will be subject to OER review and approval.

The PA will respond promptly and participate fully in the review of all Monthly, Quarterly and Annual Reports submitted to the State or its Contractors. The PA will be required to respond to data requests from OER, the DPUC, the PUC, and the EERMC when additional information is requested.

a. Monthly Reports

The PA will prepare and submit Monthly Reports to OER, the DPUC, the PUC, and the EERMC. These reports must include: (1) actual expenditures for administrative, information technology, and service delivery costs compared to the budget amounts; and (2) MWh and MMBTU savings estimates. Monthly Reports include numerical data that document progress toward achieving the PA's overall savings targets and are considered to be activity monitoring reports.

b. Quarterly Reports

The PA will prepare and submit Quarterly Reports to OER, the DPUC, the PUC, and the EERMC. Quarterly Reports must include: (1) actual expenditures for administrative, information technology, and service delivery costs compared to the budgeted amounts; (2) committed customer incentive payments as evidenced by a signed incentive contract that specifies that a future incentive payment will be made to a PA customer for energy efficiency measures; (3) report of progress made towards achieving savings targets, and other agreed-upon indicators of performance; (4) a summary of activity highlights for the quarter; and (5) a summary of any significant changes or anticipated changes in implementation strategies and services.

c. Annual Reports

The PA will prepare and submit Annual Reports to OER, the DPUC, the PUC, and the EERMC, and all distribution utilities. Annual Reports must include: (1) actual expenditures for administrative, information technology, and service delivery costs, compared to the annual budget (2) committed customer incentive payments as evidenced by a signed incentive contract that specifies that a future incentive payment will be made to a PA customer for energy

efficiency measures; (3) a summary of progress and highlights for the year, including any significant changes in strategies or services and indirect savings acquisition activities; (4) report of progress toward achieving savings targets, and other agreed-upon indicators of performance; and (5) the annual savings claim, with adequate supporting data to meet the requirements of the State for verification by the PUC and DPUC.

d. Occasional Reports to Distribution Utilities

The PA will provide information to individual distribution utilities for planning and ratemaking purposes on a quarterly basis. The PA will provide each distribution utility with a list of active and completed large projects in its service territory.

In April and September of each year, the PA will provide each distribution utility with detailed information for distributed utility planning purposes.

e. Information Requests

The PA will respond in a timely and complete manner to any information or data requests regarding program budgets, expenditures, savings, and activities submitted by the OER, the DPUC, the PUC, and the EERMC.

Program Planning, Operations, and Implementation

The PA will be required to manage, oversee, and implement energy efficiency programs to the existing customer classes directly or through subcontractors as it chooses. Important aspects of delivering these services include: (1) ensuring consistent and effective service designs; (2) using creative and effective marketing strategies; and (3) providing accessible and widespread program delivery. The PA must develop methods to ensure that the services and initiatives are meeting their adopted objectives, and that PA funds are being spent effectively.

Note: Bidders' proposals must detail their program operations and implementation strategies.

a. Planning of Program Offerings

The PA will have primary responsibility for the development and revision of program offerings, including discontinuing existing programs and offering new programs, when appropriate. On an annual basis the PA will review the programs offered and their effectiveness for the purpose of improving and modifying program designs. The PA will have broad discretion to design program offerings, provided all markets served by the existing programs continue to be served, and the PA is making appropriate progress towards achieving its performance goals, as specified in its contract with OER and approved by the PUC.

b. Annual Plan

Each year, the PA will prepare and submit an Annual Plan for the following year to OER, the DPUC, the PUC, the EERMC, and the distribution utilities by October 1. These plans must

comply with the least cost procurement standards and will be subject to a coordinated review by the State and PUC oversight and approval. The PUC will have the authority to modify, reject, or approve the Annual Plans. The Annual Plan will summarize the PA's market intervention strategies, program offerings, emerging markets initiatives, and other planned implementation activities (including competitive solicitations, if any) for the coming year. These components should be presented as part of an integrated strategy for each of the three primary customer classes: Market-Rate Residential, Income-Eligible Residential, and Commercial and Industrial.

In developing each year's Annual Plan, the PA must consult with OER and the EERMC. Representatives from the PA are expected to attend monthly EERMC meetings to gather stakeholder input for the development of the Annual Plan. It should also make full use of the following information: (1) reports from the PA market assessment and evaluation activities undertaken by the PUC, DPUC, EERMC, and OER ; (2) the PA's formal Quality Assurance system (including participant satisfaction/feedback records); (3) feedback from subcontractors; (4) ongoing, informal feedback from individual participants; (5) ongoing solicited and unsolicited input from business, professional and trade associations, trade allies, and other groups that the PA interacts with over the year; and (6) the PA's knowledge of regional and national information regarding energy efficiency technologies and opportunities, program experience and evaluation results.

c. Cost-Effectiveness Screening

The PA must assess the cost-effectiveness of efficiency measures and programs for both program design and delivery purposes according to the Rhode Island Test as described in [Docket No. 4600](#).

The PA will not be responsible for the development, maintenance, distribution, or support of statewide cost-effectiveness screening tools other than for the PA's own use.

The Rhode Island Test defines the avoided cost methodology and numbers the PA will use in measure and program screening. The PA must also incorporate into its screening tools any new avoided costs approved by the PUC and any revised risk or externality adjustments ordered or approved by the PUC for use in system-wide programs.

d. Technical Reference Manual

The Technical Reference Manual is a regularly updated, comprehensive list of all measure and program assumptions used in determining measure and program cost-effectiveness. The most recent [Technical Reference Manual](#) (TRM), current as of October 20, 2022, is available online. The PA will be responsible for establishing a new TRM and to maintain and update the TRM so that it contains current documentation on all measure and program assumptions.

Changes to existing measure characterizations and program assumptions, and all assumptions for new measures and program offerings, will be coordinated with the EERMC and the DPUC. All changes will be documented in the TRM, including the basis for the new assumption. Annually,

the PA will provide the TRM to OER, the PUC, the DPUC, the EERMC and the distribution utilities.

e. Customer Class Assessment Activities

The PA will collect, compile, and assess information on the characteristics and status of customer classes targeted by the existing programs. This information should include, for example, changes or expected changes in these markets, technology changes, design, and management strategies to increase energy efficiency, and the status and progress of PA-funded programs in capturing the potential for cost-effective energy savings. The PA will need this information to achieve its objectives, assess its performance, and recommend changes to programs. This information must be adequate to provide the basis for improving and redesigning programs. The PA should coordinate its information collection activities with the PUC and the DPUC for information needs for future estimates of energy efficiency potential and monitoring and evaluation activities.

The PA's responsibilities with respect to collecting information related to market transformation effects will be limited to data about its efforts (for example, the PA will collect information about its installations, but it will not be responsible for collecting information about awareness of new energy efficient technologies among Rhode Island residents).

f. Manage Subcontractors and Service Providers

The PA will solicit, select, hire, and oversee employees and subcontractors to deliver energy efficiency services, and develop methods for managing the performance and compensation of service providers. The PA should place a high priority on developing methods to assure coordination, integration, and joint promotion of efforts that are relevant to more than one customer class.

The PA will develop and oversee compensation levels and mechanisms for direct employees and for subcontractors and will collect and compile information for documenting performance. It will review, approve, and pay subcontractor, service provider, and other service-related expenses in a timely manner.

g. Quality Assurance

The PA will develop and maintain quality assurance standards and tracking and monitoring mechanisms for each initiative, ensuring that both direct employees and subcontractors apply the quality assurance standards and methods set forth by the PA. These mechanisms must be submitted to the PUC for approval. The PA must ensure that such standards and tracking and monitoring mechanisms are operating effectively for all services and initiatives.

h. Performance Assessment

The PA will be responsible for collecting, maintaining, and providing information sufficient to assess program and market performance for the purpose of assessing its own effectiveness as

well as the performance of its subcontractors. The PA will make this information available to State energy agency staff and independent evaluation firms. It is not anticipated that the PA will conduct formal "process" evaluation activities. If it is determined those are necessary or desirable, they would be paid for out of the funds set aside for formal evaluation activities.

Note: Program monitoring and ongoing assessment of service and initiative implementation effectiveness are the responsibility of the PA.

i. Program Marketing, Consumer Information, and Education

The PA must develop and implement a public and consumer information strategy to:

- (1) promote customer participation in and market awareness of PA services;
- (2) increase consumer awareness and understanding of the benefits of energy efficiency both for participants and non-participants;
- (3) increase consumer demand for energy efficient products and services; and
- (4) affect consumer decision-making in consumer-driven energy efficiency choices. At a minimum, the PA must provide:
 - (1) a toll-free number;
 - (2) a web page describing services available to customers;
 - (3) effective customer response and referral procedures; and
 - (4) a system for addressing and resolving customer complaints promptly.

The PA will also develop and implement energy education and technical training services and initiatives, including cooperative activities with Rhode Island educational institutions, vocational training, and continuing education.

Note: Bidders' proposals must detail their public and consumer information strategy. OER is actively seeking creative proposals for increasing public knowledge of the systemwide benefits of energy efficiency.

j. Technical Assistance and Educational Support for Energy Code Activities

The PA will provide technical support and training regarding the residential and commercial building energy codes. The anticipated support includes, but is not limited to: (1) development, production and delivery of educational materials; and (2) development and delivery of workshops and professional training. The PA will not be responsible for building code activities that require the development of new provisions for the energy code, legislative advocacy regarding adoption of new or updated energy codes, or the evaluation of energy code activities.

k. Develop Independent Funding Sources

The PA may facilitate the development of, and/or develop, independent energy efficiency funding mechanisms that leverage non-PA funds (such as grant funds).

l. Coordinate Program Data Collection Activities

The PA will coordinate, manage, and secure required program data collection from subcontractors, distribution utilities, and other appropriate entities. The PA will ensure that data definitions, formats, collection, processing, storage, and retrieval procedures used by it and any subcontractors or agents are consistent and result in an integrated and easily accessible, set of data for all programs.

Note: Bidders must demonstrate their capability in this area and specify how they will ensure this data collection and coordination occurs.

m. Coordinate with Existing Market Participants

The PA will coordinate its efforts with existing market participants, such as vendors, builders, contractors, trade allies, trade associations, engineers, and design professionals, to more efficiently deliver energy efficiency services to Rhode Islanders. The PA's efforts in this area may include education and training of existing market participants, subcontracting for the delivery of energy efficiency services, cooperation regarding service delivery, or other means of coordination.

Note: Bidders' proposals should thoroughly describe how bidders will recruit and utilize existing market participants to help deliver each of the major energy efficiency program initiatives proposed.

n. Coordinate with Other Energy Efficiency Activities

The PA will coordinate its efforts with other public and private energy efficiency efforts, at the state, regional, and national levels, to address challenges related to the adoption of cost-effective energy efficiency measures and practices. Other state, regional or national initiatives or organizations may emerge in the future. The PA will be expected to evaluate the potential benefits of those efforts and coordinate with and participate in them in a manner that is consistent with the Least-Cost Procurement legislation and standards.

o. Coordinate with Distribution Utilities ("DU")

The PA may coordinate with DUs on any energy efficiency programs DUs implement on their own behalf. These programs may include voluntary system-wide programs a DU may provide in its own service territory, or they may be a part of geographically targeted Distributed Utility Planning ("DUP") efforts by utilities.

When considering the application of programs or program technologies that might have a significant material impact on the integrity of a DU's transmission and distribution system, or a customer's facility, the PA will coordinate with the affected DU to determine whether power quality and power factor may be affected. If problems are identified, the PA will cooperate with the affected DU and/or customer to resolve the problem.

Note: Bidders' proposals should briefly address how their proposed program initiatives can coordinate with and enhance distributed utility transmission and distribution planning.

p. Support for Resource Planning and Program Evaluation Activities

The PA will provide the data and information necessary to support the State's demand-side management (DSM) resource planning and evaluation activities.

The PA will also provide data and information support for the independent evaluation of the PA.

The PA will cooperate actively in the identification and prioritization of information needs, the exchange of information, and the timing of work products with OER, the DPUC, the PUC, the EERMC and other entities as necessary to effectuate strategic planning, multi-year program planning and budgeting, market assessment, and program evaluation.

Program Transition Responsibilities

a. Transition after New Contractor is Selected

OER expects the winning bidder to work with the current PA to accomplish as smooth a transition as possible. The transition must be performed in an organized and efficient manner with a minimum of disruption to customers, vendors, trade allies, contractors, design professionals, and other energy efficiency service partners.

It is critical that the winning bidder manage the transition from the PA's current service offerings to those the winning bidder proposes to offer, particularly if there are any significant differences between the two groups of services. This is important to minimize confusion among customers, suppliers, trade allies, vendors, design professionals, engineers, and other market actors.

Note: If bidders are proposing significant changes from the PA's existing service offerings, their proposals must contain a general description of how they intend to transition from the current service offerings to the new ones. Bidders should be aware that the winning bidder will be required to develop a detailed transition plan.

In addition, the winning bidder may fulfill the outstanding terms of existing customer contracts entered into by the current PA. This includes assuming the existing financial obligations and requirements of program delivery such as providing customer incentives, and technical and design assistance. Customer- and project-specific information will be provided to the selected bidder during contract negotiations.

Note: Bidders' proposals should explain their plans to accept and integrate these obligations into their own service delivery strategy.

Bidders should also be aware of existing loan programs since the terms of the loans may extend beyond the end of the current contract term.

b. Program Termination Transition

If the PA's role is terminated or transferred to another entity on any future date, the PA shall cooperate with and assist any such transition process. This obligation shall include without limitation, the sharing and transfer of data and management information systems and software.

TECHNICAL AND BUDEGT REQUESTED INFORMATION

Narrative and format: Vendors must submit a technical proposal which addresses each of the following elements and is limited to 60 pages (this excludes any appendices and as appropriate, resumes of key staff that will provide services covered by this request):

A. **Staff Qualifications** – Provide staff resumes/CV and describe qualifications and experience of key staff who will be involved in this project, highlighting their experience in program management and administration of energy efficiency services and incentives. Please also include individuals, either as staff of the main vendor, or a subcontractor, with experience in the following areas:

- successful delivery of efficiency services to low income, environmental justice, and otherwise disadvantaged communities
- clean technology workforce development, with a particular focus on recruitment and training of individuals from disadvantaged communities
- excellent communication with stakeholders and the community, to streamline incentive uptake and delivery.

B. **Capability, Capacity, and Qualifications of the Vendor** - Please provide a detailed description of the Vendor's experience as a PA, and/or provider of Efficiency-as-a-Service. List a minimum of three (3) relevant client references, to include client names, addresses, contact names with emails and phone numbers, dates of service and type(s) of service(s) provided.

C. **Work Plan** - Please describe in detail, how you propose to fulfill the functions of a PA for the state of Rhode Island. The following elements should be included:

- A proposed plan for performing the tasks denoted in Section B.
- Bidder visions for achieving LCP's core goals.

The cost proposal should include two components:

- Budget Proposal
- Budget Narrative

Bidders should base their cost proposal on the 2022 State Energy Efficiency Programs Incentive Budget that was approved by the PUC.⁴

The total programmatic budgets for the electric and gas efficiency programs were the following:

Electric Programs

Residential Programs: \$ 32,998,300

Income-Eligible Programs: \$16,801,200

Commercial and Industrial Programs: \$49,976,600

In 2022, these programs supported 297,957 customers

Natural Gas Programs

Residential Programs: \$14,975,500

Income-Eligible Programs: \$9,320,700

Commercial and Industrial Programs: \$9,507,600

In 2022, these programs supported 152,624 customers

The bidders shall also include the costs for the following:

- 1.) Customer support (phone service and email) from 9am to 4pm Monday through Friday.

⁴ The 2022 Energy Efficiency Year-End Report is available through the PUC:
https://ripuc.ri.gov/sites/g/files/xkgbur841/files/2023-06/5189-Energy%20Efficiency%20-%20Year-End%20Report%202022%20-%20PUC%206-1-23_1.pdf

- 2.) Maintaining a website that will represent the state’s energy efficiency programs that will be subject to OER review and approval prior to launch.
- 3.) Attending monthly EERMC meetings programmatic manager (1 FTE) in Providence from July 2024 through March 2029.
- 4.) Legal (1 FTE) and programmatic manager (1 FTE) staff time to attend the annual state energy efficiency docket proceedings before the Public Utilities Commission in Warwick, RI. The budget for this task should reflect 3 docket meetings in Warwick with 8 hours budgeted for each meeting.
- 5.) Legal (1 FTE) and programmatic manager (1 FTE) staff time responding to data requests from the Public Utilities Commission, Division of Public Utilities and Carriers and other potential intervening parties. The budget for this task should reflect 120 hours budgeted for this task.

The **Budget Proposal** must provide a proposed “not to exceed” time and materials budget for this engagement broken down by task and all the individual sub-components, activities, and services proposed in the Work Plan portion of the Technical Proposal. Please specify one-time start-up costs and ongoing operational costs in your budget proposal. This budget must be separated by calendar years. This budget must be presented in the Budget Template provided. Additionally, the budget must contain the hourly rates of each staff member working on the program administration. If the scope of work is significantly adjusted by OER during the contract, the budget for the Program Administrators can be renegotiated.

A **Budget Narrative** must be provided that confirms that all the content (i.e., tasks, subtasks, services, activities, deliverables, etc.) reflected in the bidder’s Work Plan is clearly and transparently accounted for in the Cost Proposal. Bidders who fail to do so may be disqualified.

Please be advised:

The PA is expected to maintain a clear, up-to-date log of all hours worked and how those hours were spent, broken down by task. For each relevant staff member of the PA, its partners, and/or sub-contractors, the PA is expected to provide monthly invoices to OER detailing all hours worked by each staff member (by task), their hourly billing rate, and total costs associated with each staff member. Each bill should summarize total billable time and costs across all relevant staff. Specifically, these invoices should be delivered to OER no later than the fifth business day of the month following the month for which work is being reported and billed.